SACLANT
D M S
(Document Management System)

22 May 02

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DEFINITIONS

* A Document is any recorded information regardless of its physical form or characteristics (data, text, graphic, images, voice, video, etc.)

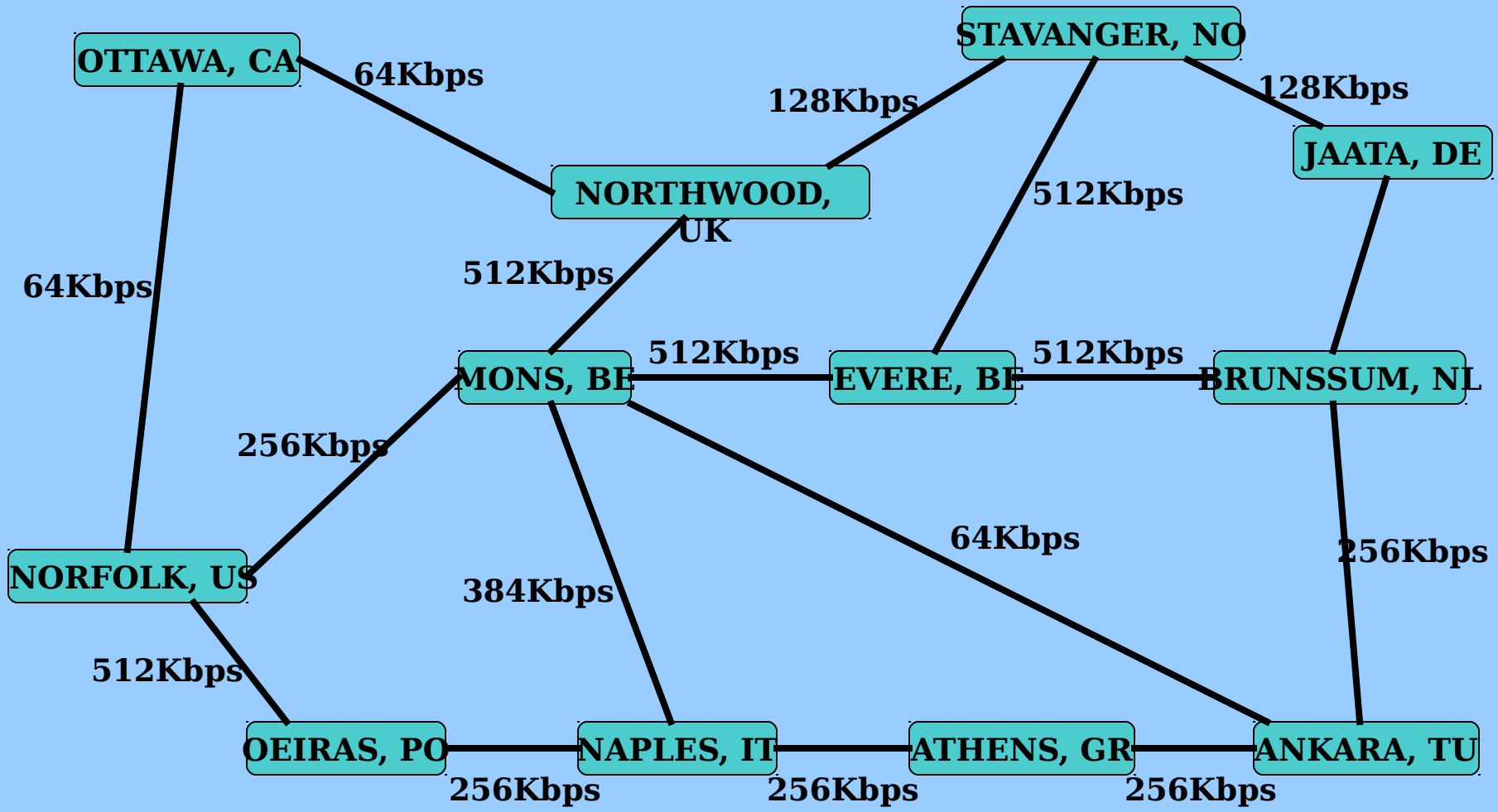
* Within this DMS initiative, documents are initially defined just as electronic copies of official signed papers and/or publications

* Integration with other electronic documents (e.g. messages, and e-mails) will be a further evolution
  Note: present NATO "minimum" requirement should be the ability of finding all published messages and official e-mails by simply using the DMS archiving functions/tools

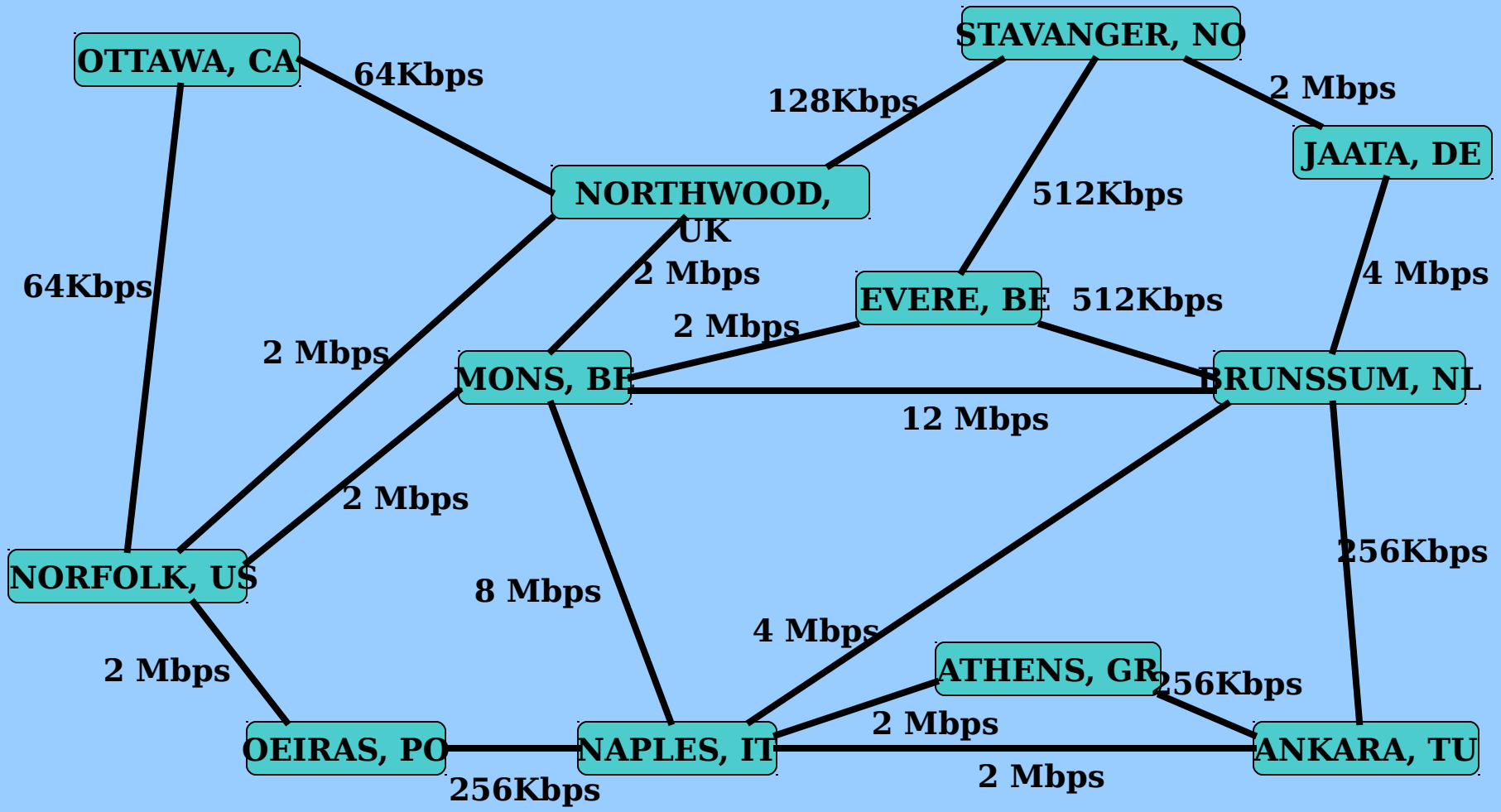
DEFINITIONS

* DMS is one of the main AIS Core Service
* DMS will provide functionality for document Production, Publication, and Workflow
* Production is defined as document preparation, creation, and updating
* Publication is defined as Document release, dissemination, distribution, archiving, retrieval, classification, indexing
* Workflow is defined as the collaborative user processes and transactions by which documents are managed (produced and published)

Current NATO CLASS network (NIDTS)



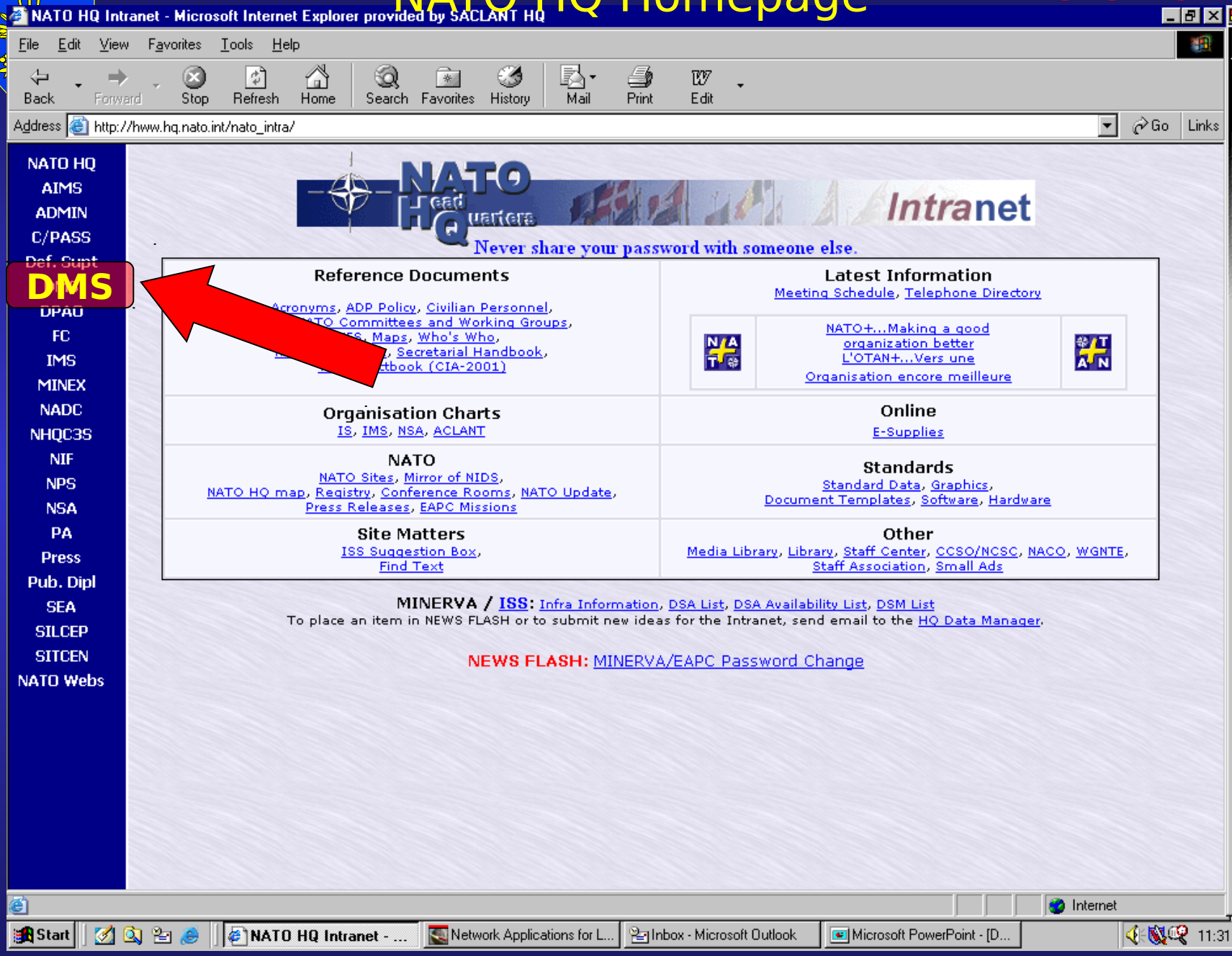
NIDTS network (2003)

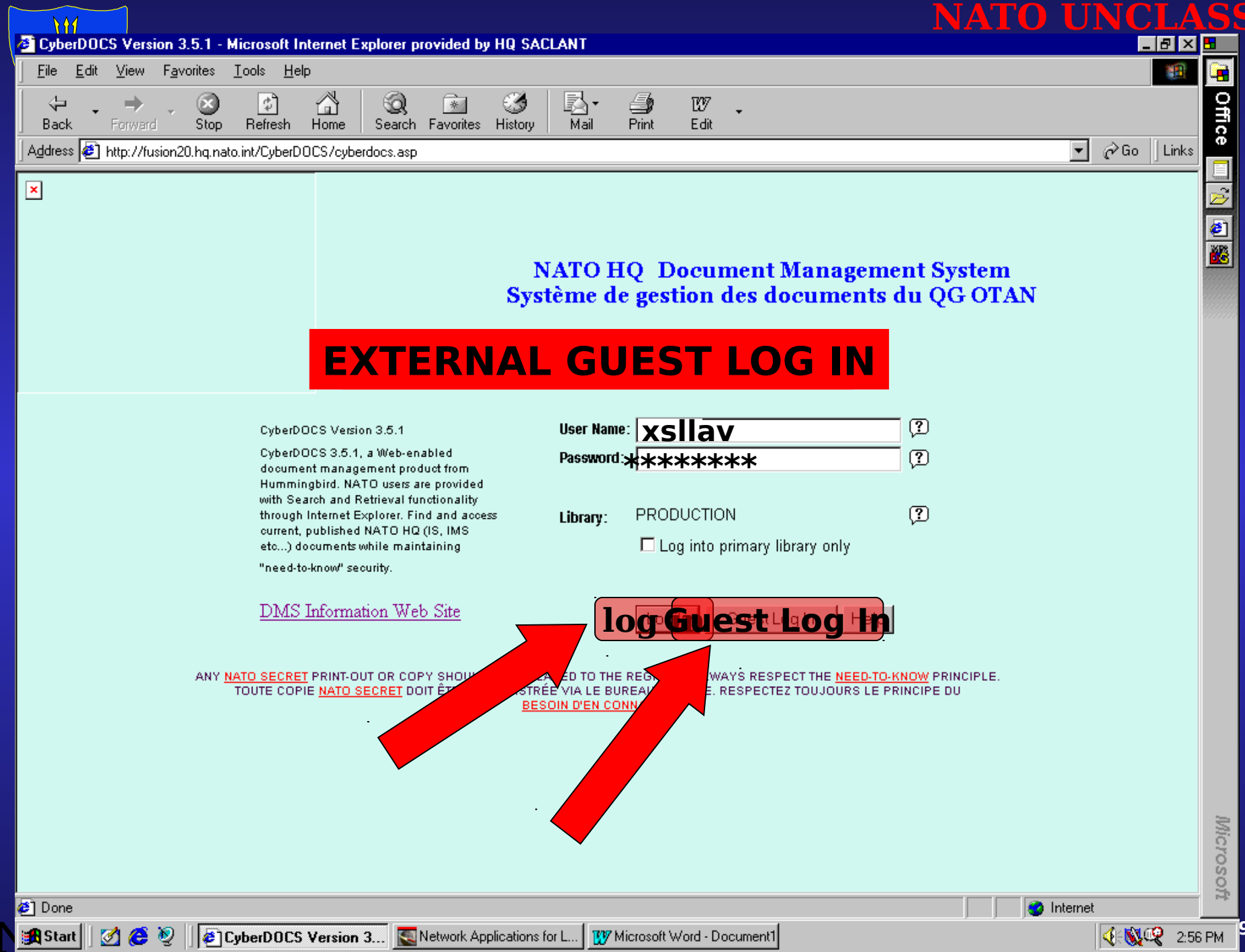


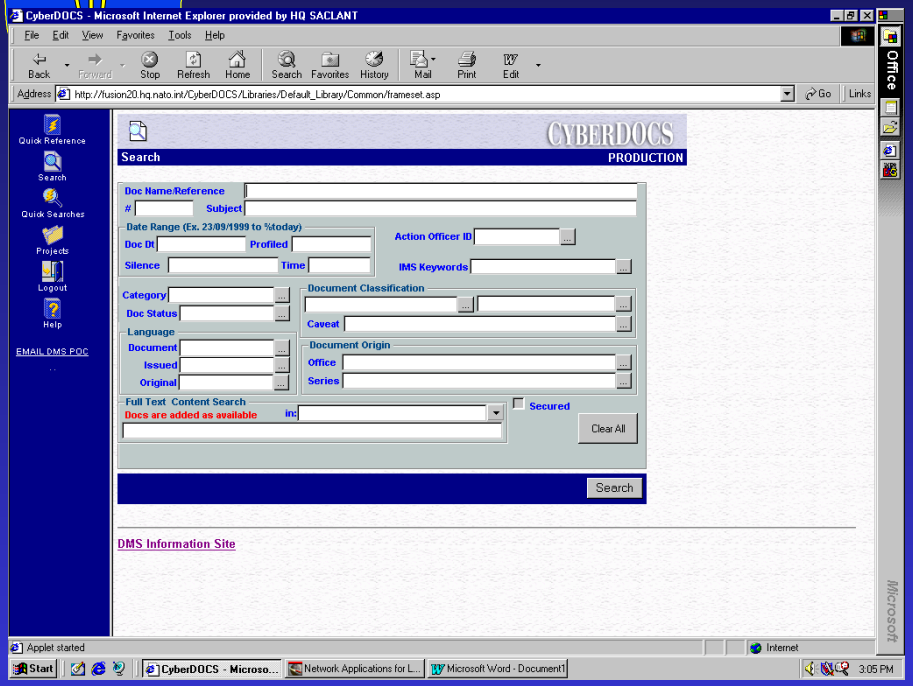
NATO HQ DMS

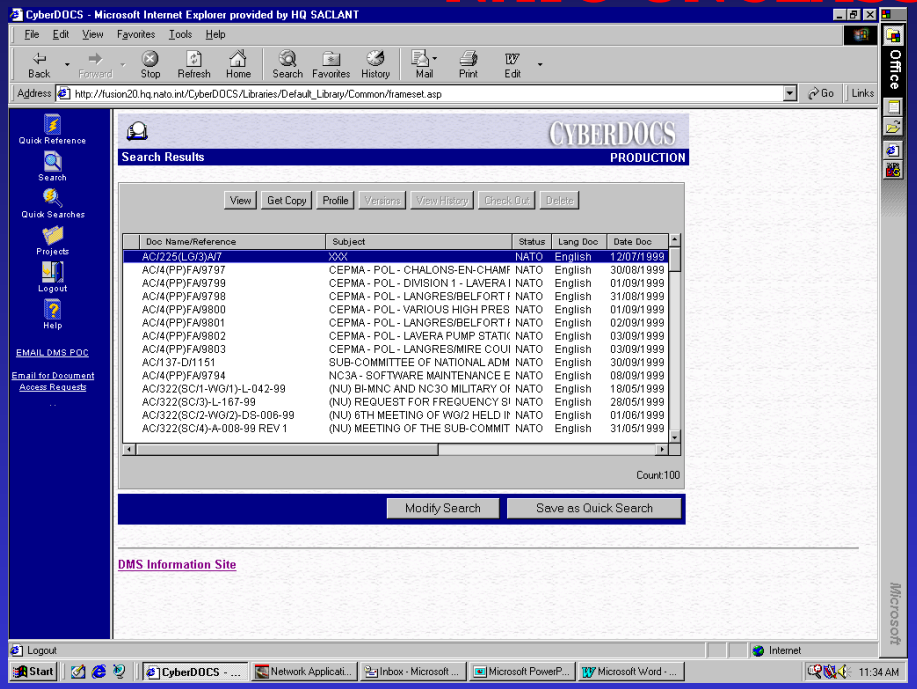
- NATO HQ has implemented a DMS based on PCDocs s/w
- NATO HQ PCDocs is a Document Publication solution that currently contains more than 1 million of official documents
- The NATO HQ DMS official documents should also satisfy about 75% of SACLANT requirements (legacy system)

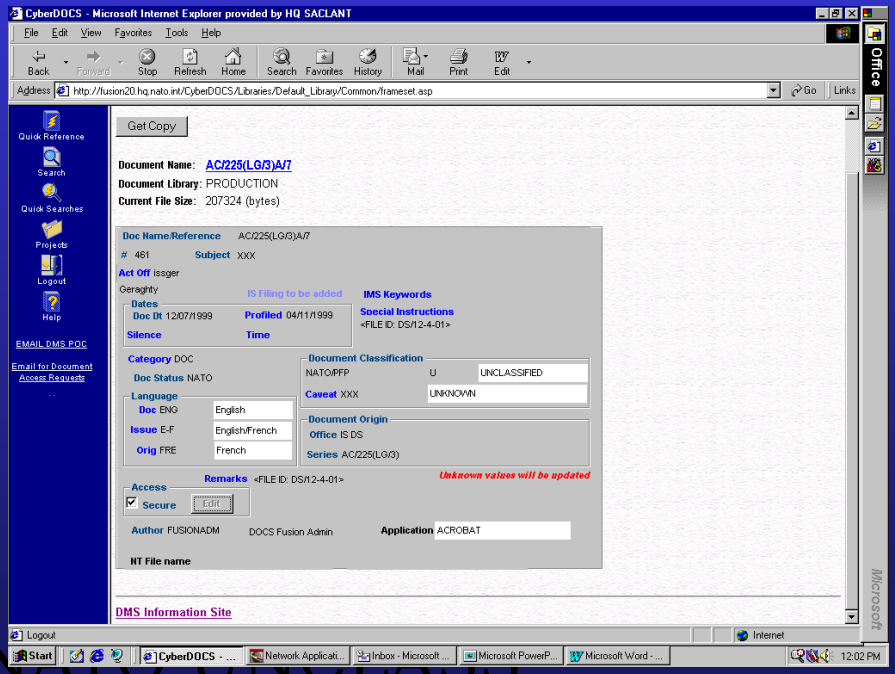
NATO HQ Homepage

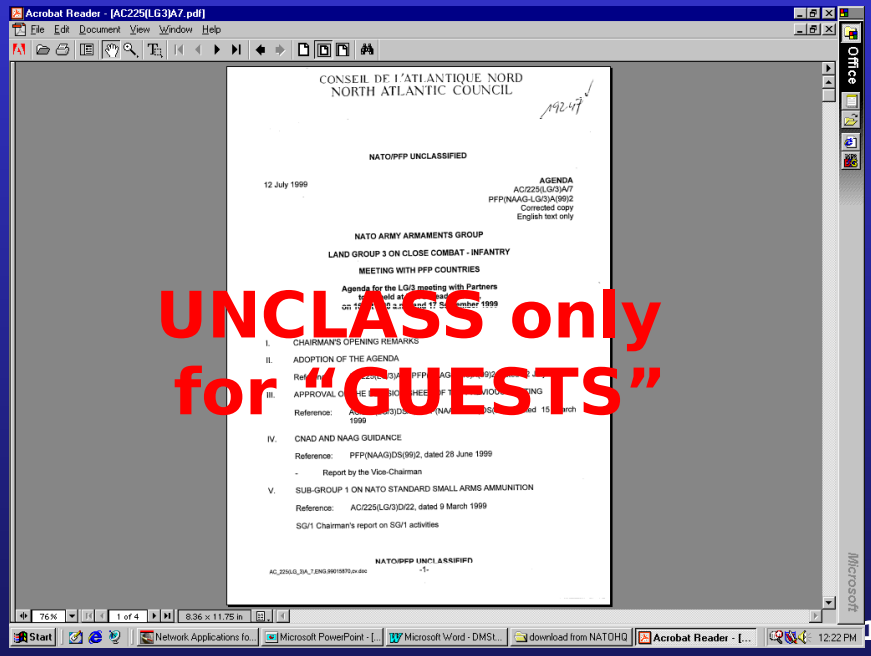



CyberDOCS Version 3.5.1 - Microsoft Internet Explorer provided by HQ SACLANT
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Edit
Address http://fusion20.hq.nato.int/CyberDOCS/cyberdocs.asp
Go Links
NATO HQ Document Management System
Système de gestion des documents du QG OTAN
EXTERNAL GUEST LOG IN
CyberDOCS Version 3.5.1
CyberDOCS 3.5.1, a Web-enabled document management product from Hummingbird. NATO users are provided with Search and Retrieval functionality through Internet Explorer. Find and access current, published NATO HQ (IS, IMS etc...) documents while maintaining
"need-to-know" security.
DMS Information Web Site
User Name: xsllav
Password: ********
Library: PRODUCTION
Log into primary library only
log Guest Log In
ANY NATO SECRET PRINT-OUT OR COPY SHOU
TOUTE COPIE NATO SECRET DOIT ÊT
ED TO THE REG
STRÉE VIA LE BUREAU
WAYS RESPECT THE NEED-TO-KNOW PRINCIPLE.
E. RESPECTEZ TOUJOURS LE PRINCIPE DU
BESOIN D'EN CONN
Done
Internet
Start
CyberDOCS Version 3...
Network Applications for L...
Microsoft Word - Document1
2:56 PM








Acrobat Reader - [AC225(LG3)A7.pdf]
CONSEIL DE L'ATLANTIQUE NORD
NORTH ATLANTIC COUNCIL
NATO/PFP UNCLASSIFIED
12 July 1999
AGENDA
AC/225(LG/3)A/7
PFP(NAAG-LG/3)A(99)2
Corrected copy
English text only
NATO ARMY ARMAMENTS GROUP
LAND GROUP 3 ON CLOSE COMBAT - INFANTRY
MEETING WITH PFP COUNTRIES
I. CHAIRMAN'S OPENING REMARKS
II. ADOPTION OF THE AGENDA
IV. CNAD AND NAAG GUIDANCE
Reference: PFP(NAAG)DS(99)2, dated 28 June 1999
Report by the Vice-Chairman
V. SUB-GROUP 1 ON NATO STANDARD SMALL ARMS AMMUNITION
Reference: AC/225(LG/3)D/22, dated 9 March 1999
SG/1 Chairman's report on SG/1 activities
NATO/PFP UNCLASSIFIED

UNCLASS only for "GUESTS"

SACLANT DMS Pilot

SACLANT DMS Pilot

* Pilot Period: 14th of May-14th of September 01
* Test interoperability with the NATO HQ PCDocs (legacy system)
* Produce studies on DMS directions and requirements (in particular for Document Workflow)
* Migrate the content of the two present SACLANT Systems for Document Archiving (ALCHEMY for NC and below, and ODS for NS only) into a unique and more suitable platform

SACLANT DMS Pilot - Results

* **Workflow Requirement Study produced**

* **Interoperability with NATO HQ PCDocs partially achieved with the "SACLANT Interim DMS"**
  (which is copy of the NATO HQ DMS, but no automated data replication mechanisms implemented between the two system)

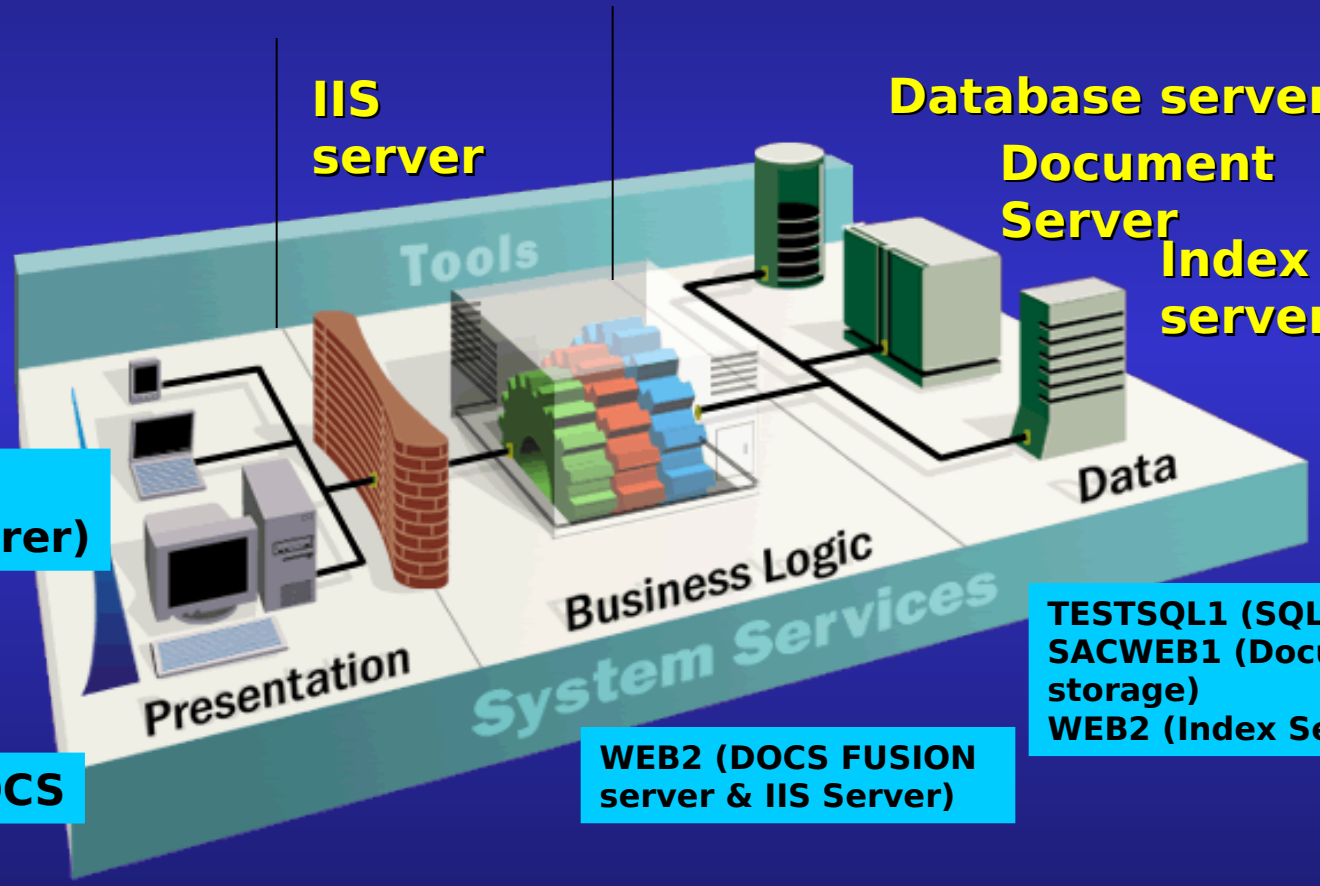
* **Interim DMS is the current solution for document Publication in SACLANT**
  (awaiting for the complete Bi SC solution through ACE ACCIS Increment 1)

SACLANT Interim DMS

- **SACLANT Interim DMS is a PCDocs solution based essentially on the same settings as implemented in NATO HQ (document Publication)**

- **Starting AUG01, our Secretariat has collected (or replicated from NATO HQ) and archived in the SACLANT DB approx. 10,000 official documents**

SACLANT Interim DMS - Architecture



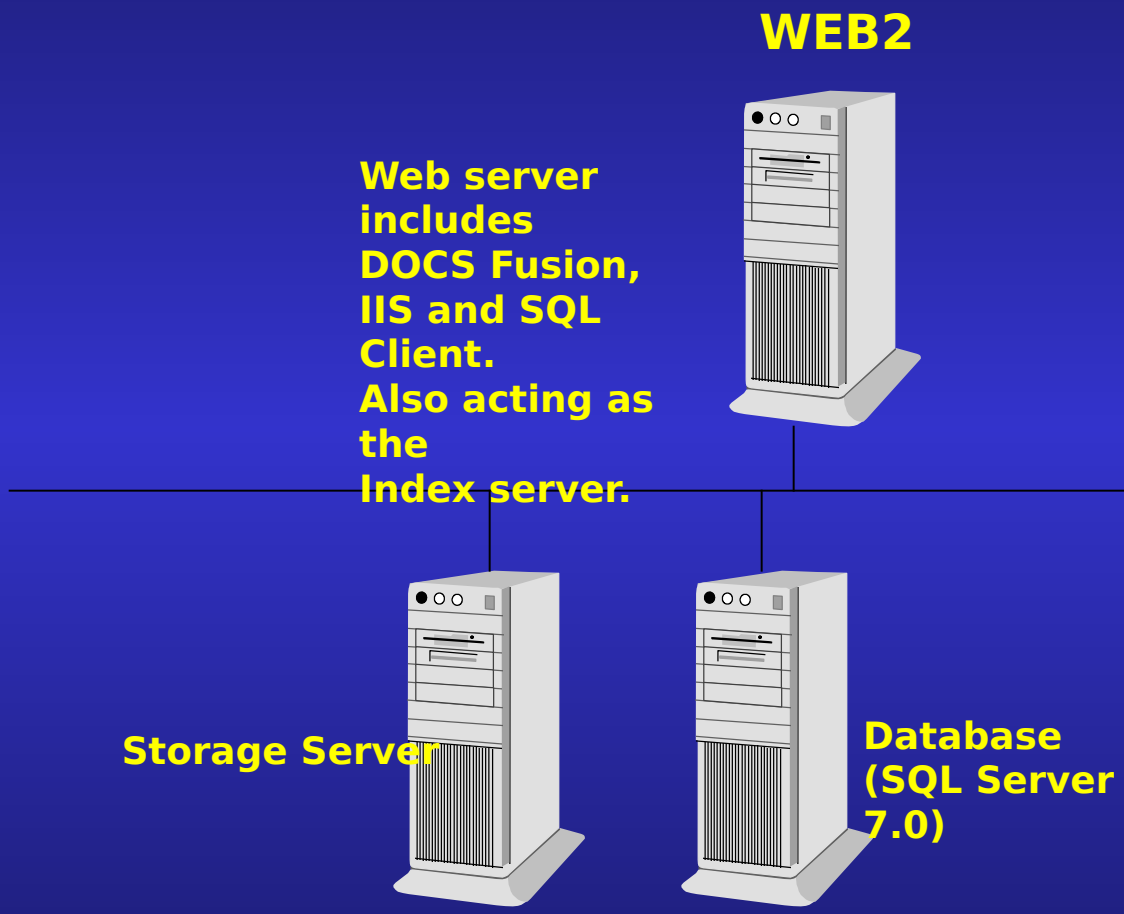
Thin Client
CyberDOCS (Internet Explorer)

Rich Client
Power DOCS

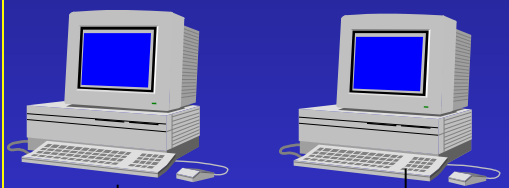
WEB2 (DOCS FUSION server & IIS Server)

TESTSQL1 (SQL Server)
SACWEB1 (Document storage)
WEB2 (Index Server)

SACLANT Interim DMS - Architecture cnt'd


WEB2
Web server includes DOCS Fusion, IIS and SQL Client. Also acting as the Index server.
Storage Server
Database (SQL Server 7.0)
SACWEB1
TESTSQL1

PowerDOCS
CyberDOCS



Client:

50 Individual Accounts (Powerdocs/Cyberdocs)

"unltd" Guest Users (Cyberdocs only)

CyberDOCS Version 3.5.1 - Microsoft Internet Explorer provided by HQ SACLANT
File Edit View Favorites Tools Help
Edit
Go Links
www.saclant.nato.int/dms
NATO
SACLANT
CyberDOCS Version 3.5.1
CyberDOCS 3.5.1, a Web-enabled document management product from Hummingbird, provides organizations with full document management functionality from a web browser. Find and access documents in DOCSFusion and DOCS Open libraries, collaborate on the documents, and maintain security and version control throughout their lifecycle.
User Name: guest
Password:
Network Name:
Library: SACLANTDOCS_LIB
Log into primary library only
Log In
Guest Log In
Help
Office
Microsoft
Done
Local intranet
Start
CyberDOCS Versio...
Network Applications f...
Inbox - Microsoft Outlook
Microsoft PowerPoint - ...
Microsoft Word - DMS ...
2:00 PM

SACLANT Interim DMS - What's next

* DOCSFusion re-install on new server
* PCDocs version 4.0 upgrade
* installation procedures manual
* system administrator training
* search and profile screens improvements
* user search criteria customisation
* Import/Export program
* Humingbird's SearchServer evaluation

SACLANT DMS Workflow Study

Completed on the 27th of July 01 with the purpose to:

* **document the current Production process of generating an official document within HQ SACLANT**
* **document the current Publication process of:**
  - **distributing official HQ SACLANT documents to other organizations**
  - **receiving official documents from NATO HQ, SHAPE etc. and distributing these documents within HQ SACLANT**
* **identify areas within the Production and Publication processes that could be automated and make recommendations on the type(s) of automation that could be incorporated**
* **identify commercially available ADP packages to provide complete Workflow**

SACLANT DMS Workflow Study Recommendations

* the most basic and immediate improvements could be made through better use of e-mail and the MS office suite

* this involves using the track change and template capabilities to facilitate the review and edit sub-process and the document preparation sub-process

* e-mail would be used for routing and forwarding versions of the document

SACLANT DMS Workflow Study Recommendations (cntd)

* the next level of improvements proposed the use of an electronic DMS as PCDocs (NATO HQ legacy system)

* this provides, at a minimum:

  - a method for managing a document's components

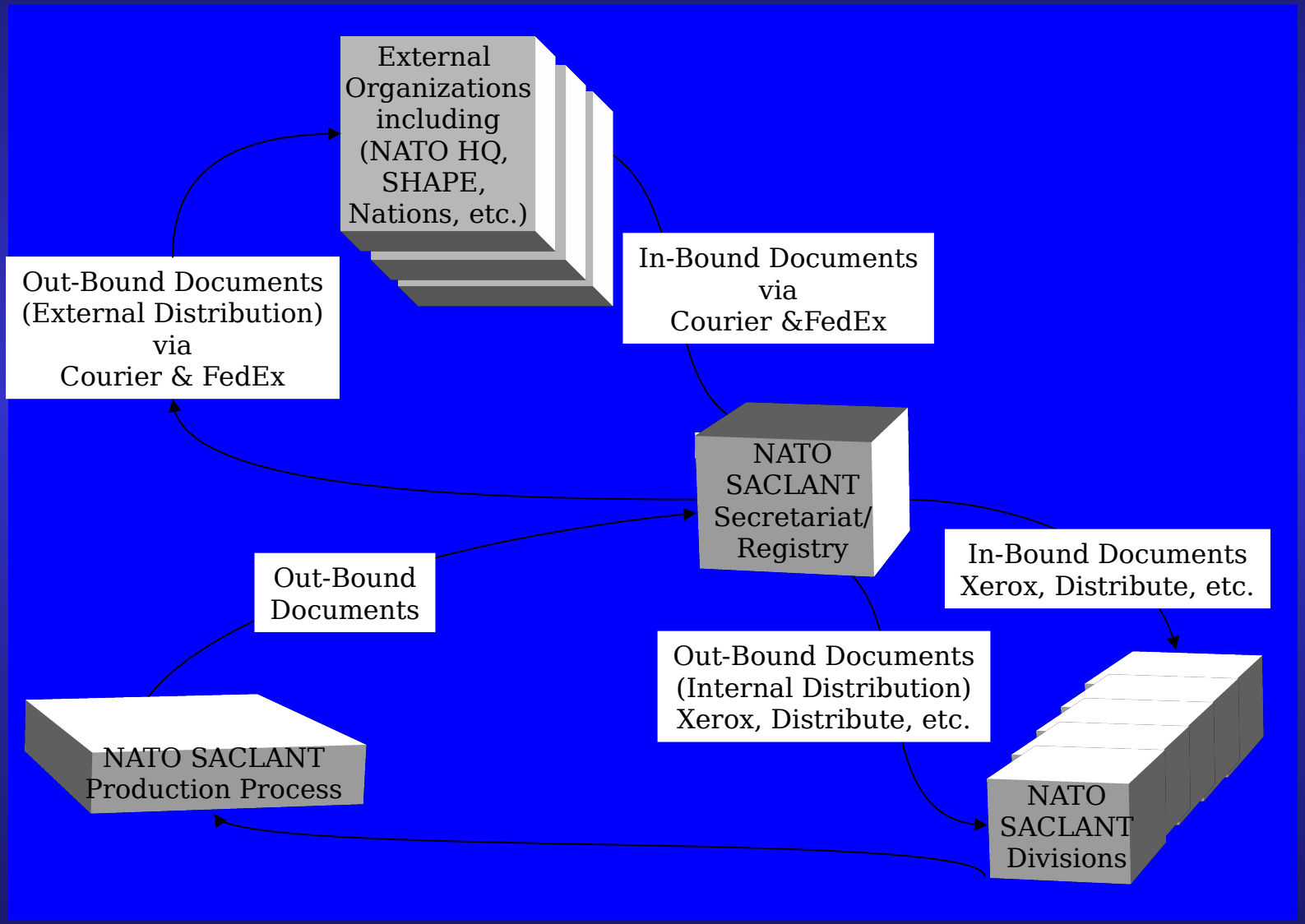
  - the ability to create libraries

  - a method for controlling document versions as well as access to these versions

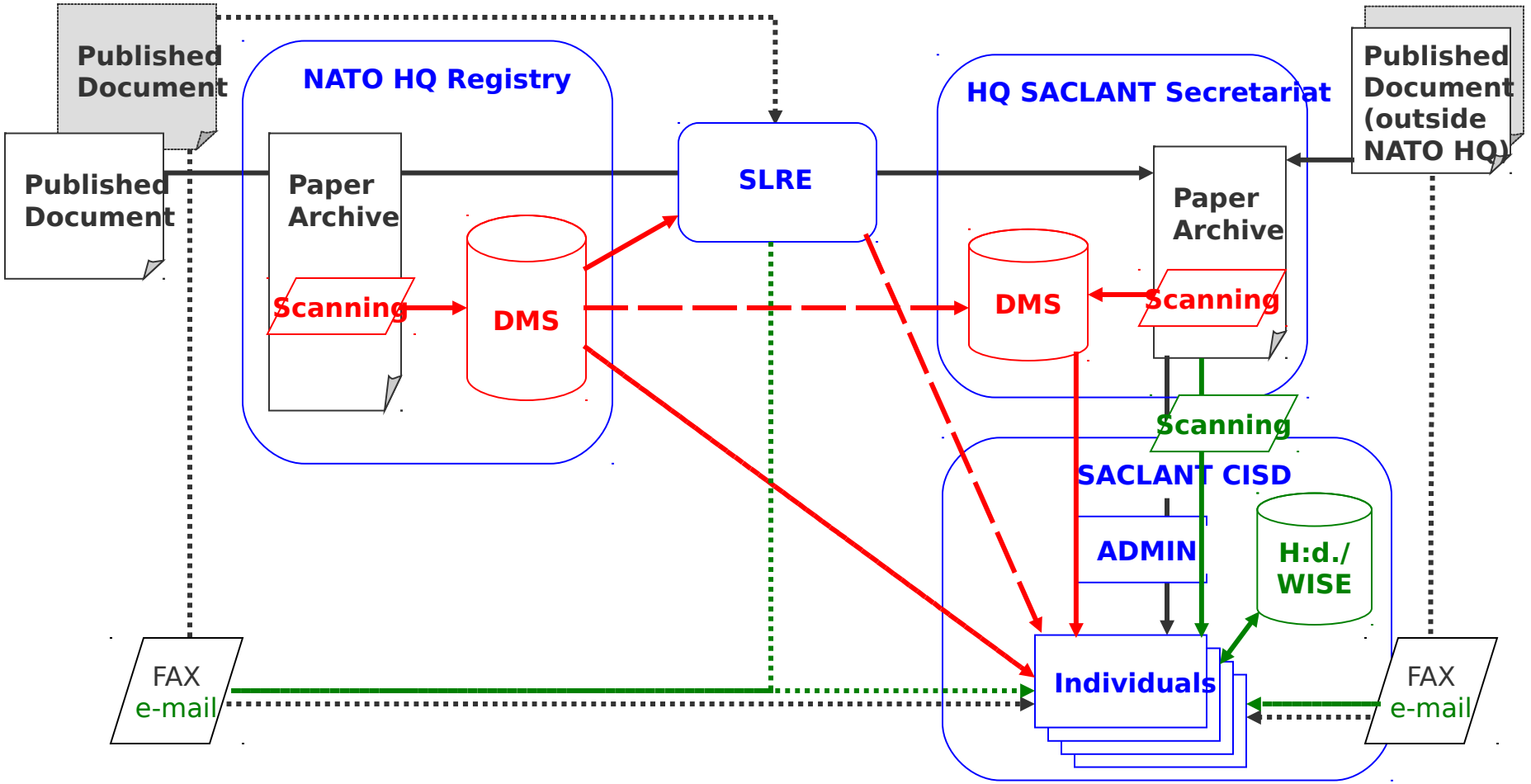
SACLANT DMS Workflow Study Recommendations (cntd)

* the final level of improvements proposed using a workflow package providing at a minimum:
  - the scheduling of activities
  - routing
  - notification
  - tracking
  - coordination of activities
* there are a variety of workflow packages available, some can be integrated with PCDocs, others will require bespoke interfaces

SACLANT DMS Workflow - Context Diagram


External Organizations including (NATO HQ, SHAPE, Nations, etc.)
Out-Bound Documents (External Distribution) via Courier & FedEx
In-Bound Documents via Courier &FedEx
NATO SACLANT Secretariat/ Registry
Out-Bound Documents
In-Bound Documents Xerox, Distribute, etc.
Out-Bound Documents (Internal Distribution) Xerox, Distribute, etc.
NATO SACLANT Production Process
NATO SACLANT Divisions

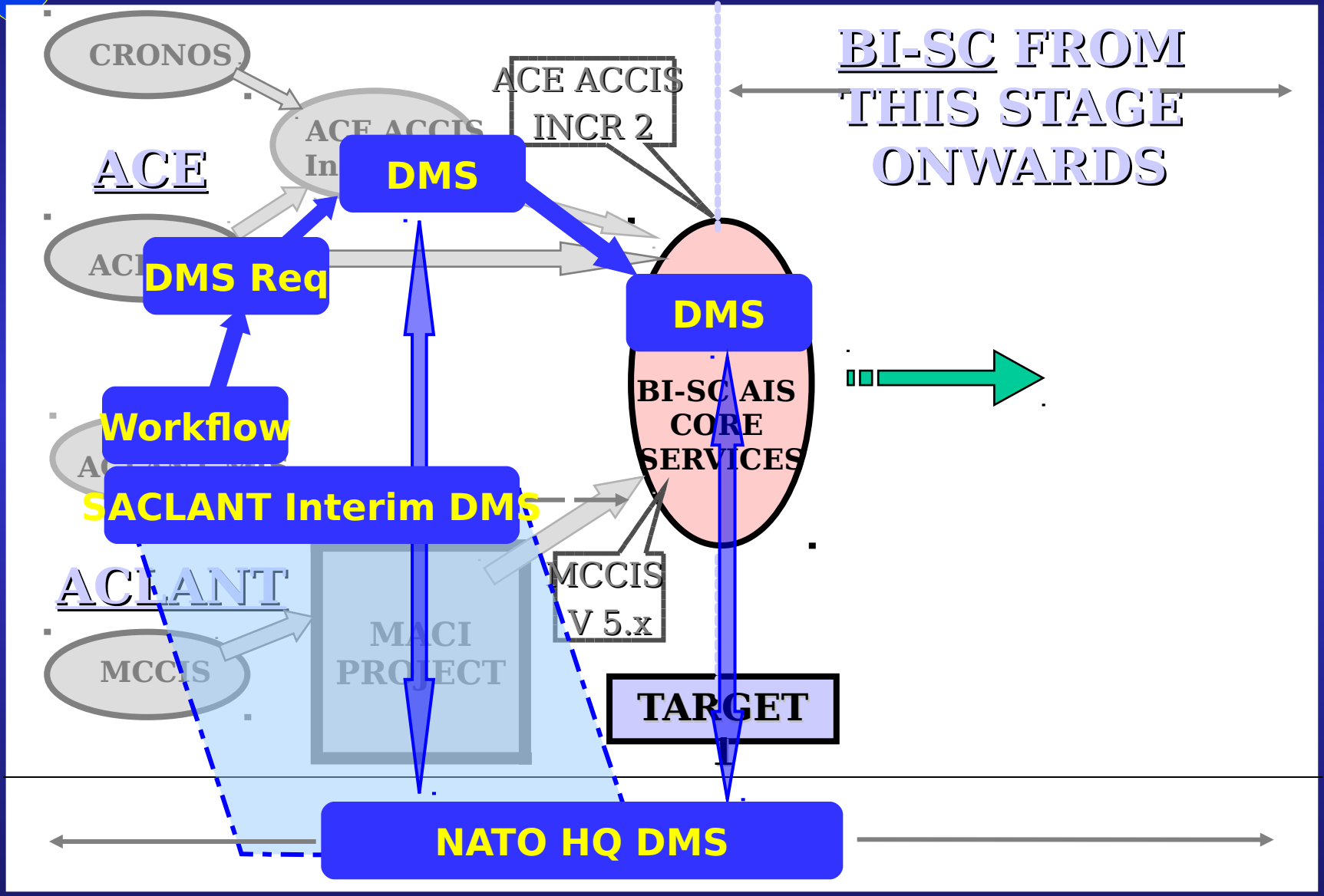
SACLANT (CISD) Incoming Official Documents - Flows and Mgmt



BiSC AIS Convergence

- SHAPE looks for the complete DMS solution (Publication + Production + Workflow) through the ongoing ACE ACCIS Inc. 1 project
- SHAPE agreed the NATO HQ DMS (PCDocs) as the "NATO legacy system" for document Publication
- ACE ACCIS DMS requirement is to be interoperable with the NATO HQ PCDocs (and with the SACLANT Interim)
- The selected ACE ACCIS DMS solution will be the BiSC AIS DMS Core Service providing the additional Production and Workflow capabilities (SACLANT Workflow Study)
- Based on the progress of ACE ACCIS Inc. 1 contract award, the Bi-SC DMS solution can not be expected before 2004

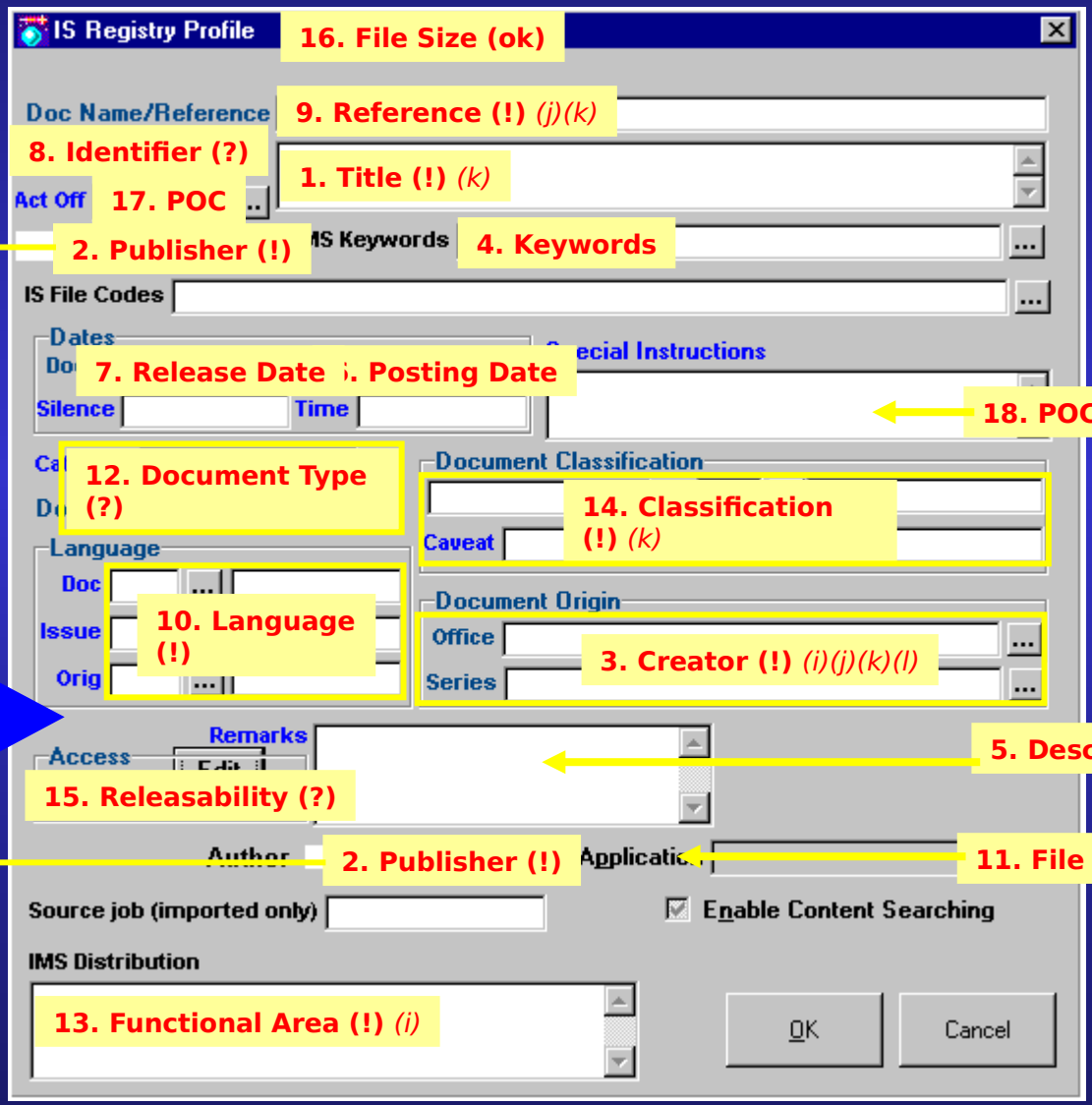
Bi SC DMS Convergence

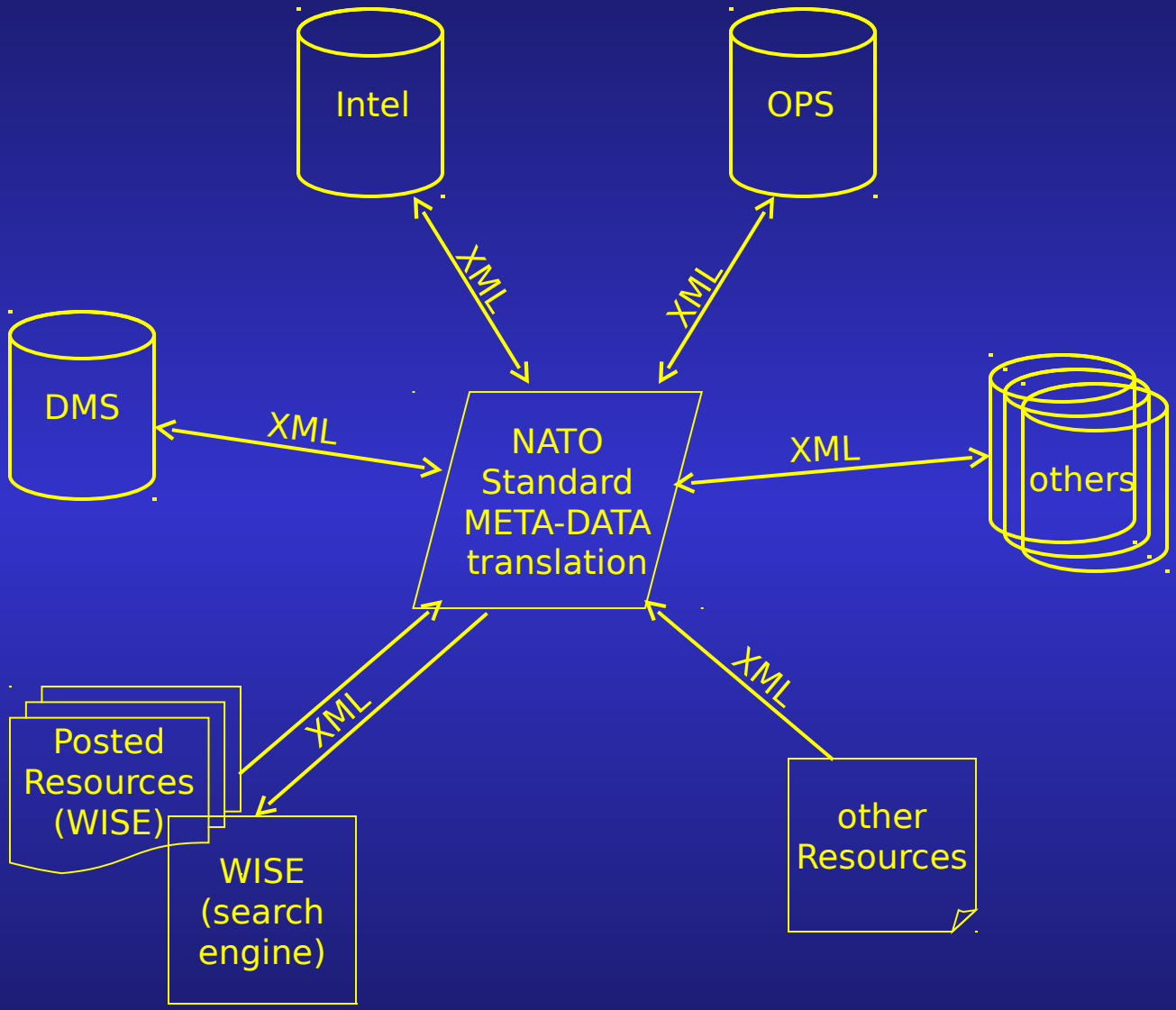


BiSC AIS Convergence (META-DATA)

The SACLANT Interim DMS "metadata" (i.e. document profiles)

mapping with NATO Standard metadata (Dir. 96-6)




Intel
OPS
XML
XML
DMS
XML
NATO
Standard
META-DATA
translation
XML
others
XML
XML
Posted
Resources
(WISE)
WISE
(search
engine)
other
Resources

SUMMARY

* NATO HQ PCDocs contains more than 1 million of official documents (legacy system for document Publication)

* SACLANT Interim DMS is a replica of NATO HQ PCDocs

* SACLANT Workflow Study documents processes and flows for Production and Publication of documents in HQ SACLANT and identifies possible automation (i.e. Workflow)

* ACE ACCIS Inc.1 selected DMS will become the Bi-SC AIS DMS Core Service providing complete capabilities (Publication + Production + Workflow)

* NATO Standard meta-data should provide interoperability

Production

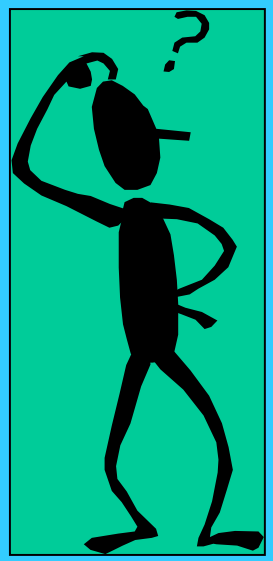
Metadata

Interim

DM

QUESTIONS ?

Publication



Workflow